

Voiceover Artist 0:00

Are you ready to manage your work and personal world better to live a fulfilling productive life, then you've come to the right place productivity cast, the weekly show about all things productivity. Here, your host Ray Sidney-Smith and Augusto Pinaud with Francis Wade and Art Gelwicks.

Raymond Sidney-Smith 0:17

And Welcome back, everybody to productivity cast, the weekly show about all things personal productivity, I'm Ray Sidney Smith.

Augusto Pinaud 0:22

I'm Augusto Pinaud.

Francis Wade 0:23

I'm Francis Wade.

Art Gelwicks 0:24

And I'm Art Gelwicks.

Raymond Sidney-Smith 0:25

Welcome, gentlemen, and welcome to our listeners to this episode of ProductivityCast. templates can be a clever time saving tool in your productivity tool belt, if you know where they are in your productivity system, as well as how to create and use them wisely. Today, we're going to discuss what a template is, or rather how you should use them to their best advantage in your own world. We're going to talk about what types of templates we use in our own productivity systems, and how to overcome some of the obstacles and making templates in your productivity software work for you. And with that, let's start off with defining templates. What are templates in your world? How do you how do you define the template? And ultimately, how do they How does your definition of a template benefit you, in your own outputs,

Augusto Pinaud 1:14

I use template for a couple of things and or more than a couple of things. So template for me is basically something that you write Finally, in the past, so you can use multiple times towards the future. So I use them in many applications, and for many purposes, you know, respond to emails and respond, things that can be really speed up and allow me instead of thinking, the response, or the same response every time allow me to look at the issue and work with the answers in a better way.

Art Gelwicks 1:52

Yeah, for me, templates fall into a couple of different categorizations. Commonly they are things that I would use for standardizing a process to make sure that it's consistent and repeatable. Or to improve the efficiency of some step in the process, maybe a capture or discussion. Finally, to really think about the simplification of a step, because templates for me are one of those things where you don't have to think about that step anymore, you pop it up, you fill it up, you know you you do the steps, and you move on to the next thing, you're not wasting mental cycles, trying to figure out what you're trying to do. And it really becomes a refinement of it. The fourth thing, though, with templates is to me, they're an educational tool. I think a lot of people benefit from taking templates, and then taking them apart and see how they were constructed. I know I do this all the time. And it helps me understand not only the process, but how the mechanisms work and gives me an idea as to how to adapt that to my own solutions.

Francis Wade 2:57

I tell you, the funny thing about templates is that when we started discussing this topic, a few minutes ago, before before the call, I thought I don't use any templates, I don't think I have a single one, I think maybe I'll take the contrary view that people shouldn't use templates. And I'll be the contrary, and today. And right in front of me was a template that I use every single week. I know. There's something to this after all. And I as I look around my life, I realized that I'm like a template freak. If I'm not, if I'm not that then I'm at least a lazy person who tries to take for what I learned from the past. So that I don't have to redo it and rethink it because it was so hard the first time that I've somehow captured it in some kind of form that I use going forward. So I think our listeners may or may not realize that these time savers are all probably already in their life. I think the poet today is in identifying them, and then replicating the idea across as many domains as possible.

Art Gelwicks 4:08

When I think you're on an important point there too, because you said the key word for me which is form, I consider in many cases, templates to be analogous to forms because of what they're doing is providing that consistent, streamlined, efficient structure for some step in a process. And I know for me, the majority of the work I do is around these kinds of form based intake solutions. So I would put forms in that same bucket as a template.

Raymond Sidney-Smith 4:39

So I think about templates as being something that is from my experience something about both quality and control. So the organization that I worked for wanted to make sure that they were controlling the outputs on the other side and in your own personal productivity. system, you are the one who's benefiting your future self by giving some level of control some level of guardrails to the outputs. So a template is a very wide category of repeatable content that you can use to control what the outputs are by controlling what the inputs are. And then on the other side, recognizing that by controlling the inputs, and and some to some extent, the output, you then can increase quality. And of course, there's there's time saving and potentially money savings there. And so many other, you know, useful benefits of the repeatability and the efficiency of a template. And I'll start by by noting that in my world, a template can be content that you use in a wide variety of places. So from a checklist of items to just a snippet of a word, to your name, address, phone number, any number of different types of things, things that you're going to do, and put into a system over and over and over again, that's the type of stuff that you want to template, or what I call templatized. And so if you're going to do that you got you have to really think about am I going to do this, you know, you don't want to create a template for a document, you're going to write once. But my rule is, if I'm going to do it three times, then there's going to be a template. And as soon as I hit that second time, do I say, okay, is this going to be a third time because then it's going to be a fourth, fifth sixth, and that attack, so I might as well create a template. And so for me, the benefit is recognizing when something is worthwhile being a template, and to to be able to templatized the items that I know, I'm just constantly putting into things, why should I waste the keystrokes, the mental energy, the the potential quality missteps, when I can just put that into a template, and then with a few keystrokes, generate that content that I know is exactly what I want, or at least I have the 80% rule, kind of the Prater principle of templates, I think, what is the 80%, that that will, that will be the substance, and then I just have to fill in the pieces,

Art Gelwicks 7:24

there's an additional piece that I would quantify on templates. And that's the creation of a template is an excellent litmus test as to your level of understanding of what you're trying to template eyes. Because if you don't have a good in depth understanding of it, you're not going to be able to create an effective template, you're going to miss things, the structure is going to be wrong, it's going to be inefficient. So you have to really get what you're trying to templatized before you can create an efficient template.

Raymond Sidney-Smith 7:54

And going back to my experience, as someone who used to build templates in an organization, I also recognize that it's a matter of helping others who may not understand your authority domain as well as you do. And so, you know, when you're creating, in my case, you know, advanced trust and estate plans. In a law firm environment, you have to make sure that every piece of those templates make sense, because then from it, you're developing hundreds, if not 1000s, of other people's outputs. And so you you think about what are all of the potential permutations that can happen in and around people's families and the law and the individual preferences as to disposition of assets, all of those things come into play. And you need to think about how much you need to think about a template versus how much you don't, because you can go down a very deep rabbit hole. And we'll get to that in some of the challenges at the end. But you know, you need to decide how much needs to be templated. Here, how much needs to be your your domain authority, and how much just needs to get you into a framework. So for example, I have a, an email template, which is very basic, it is just the salutation, a set of prompts for me to be able to answer an email in the format that I want to answer almost every email professionally. And then a closing salutation. I don't know what you call that a closing. And so it closes out the email, and then that's it. And that's all I want. I don't I don't want the template to be doing more thinking for me than just structure. So there is kind of two sides to that. In terms of thinking about the template. agree, disagree.

Augusto Pinaud 9:48

There is a couple of things on that. You know, one The reason, the one, of course, is that we can argue the efficiency factor on that one, but I think templates give you two things, I will argue that all of us has unintelligent a point where we are rested full of attention, energy, that's probably that's not a problem. When you are there, you can write the email, you can use that text and it will come good. The problem is when you are not, that is the moment one of the moments where those templates come to be really, really, really useful when you can, then now use that text that you already predefined. That, you know, it works that is grammatically correct. And all that. That's, that's one of the biggest issues. The other one is we tend to think, and when we don't do the templates, then you are thinking and rethinking and thinking again, the same thing, but you are not making any step to standardize and make it work better. And I see that over and over. That's the other thing where, where those templates work really, really well. The third, the other aspect I want to mention with templates is how much when you know people tend to, to think often that well. But I want to be more spontaneous if I use template for things that I cannot be as spontaneous and I will argue is exactly the opposite. The templates allows you to look at that thing that you create. And now look okay, do I want to tweak or do I want to adjust it to do I want to make something specific for this response on this account. As a person who who start his career in sales, I had templates for proposals for Responsive proposals, and everything else, I always was really interesting for me how my co workers, every time they were going to do a proposal, they start from zero, you know, they did not have a template they did not. And then begin looking and redo everything that basically increase the number of mistakes, because now you have a variability factor. So that's the other thing from, for me, in my world, where templates do incredible things, you can now reduce over time, the number of mistakes and make little adjustments that make the job much better.

Raymond Sidney-Smith 12:28

And with that, let's start talking about what productivity software you actually use, where you use templates. And that could be if the system has an internal or embedded template system. Or if you just use some other mechanism for being able to create those templates. I'll start with a very basic underlying premise, you're always using a template. So surprise, no matter where you are, in whatever system you're using, as soon as you're using a system, there is a template involved. If you open up a day planner, on paper, that day planner likely has a structure, that's a template, if you open up a Word document, there is a file called normal.do, TX or normal dot.if. It's an older version of Microsoft Word, but normal.do, TX is a template. And while you don't

see anything, there's actually a lot of underlying information inside of normal.do Tx. And what's really cool about it is that you can modify that normal file, that Normal template. And when you add, for example, personal dictionary items, you know, when you when Word says to you, hey, this word is misspelled wrong, but it happens to be technical jargon that you use every day in your environment. And you say, okay, save that, it saves it into the system. And then you say, you know what, I'd like to actually have this paragraph of content always available to me with this technical jargon, you can actually save that, and when you save it, it actually saves it into that normal.do tx file. And so I always tell everyone, as soon as I start working with them, you need to backup your normal.do tx if you're going to start utilizing some of the underlying template structures within your normal.do Tex t file or deity exe file. And actually, at one point, when I was a very heavy Microsoft Word user, I had a normal.dx file that was megabytes in size. Now think about you know, normal one starts out at like 20k, maybe 19k with some good you know, amount of text. And and mine was several megabytes large. So you can only imagine how much content I had shoved into this normal.do tx file. And you need to make sure that you back that up if you do end up using that and that could be you know, having various keystrokes trigger a series of questions for you that are that are modal. little pop up windows that then dialog you through a document or letter or those kinds of things. So I'll start there, and what are some of the other software that you use and the templates that you might use within them.

Augusto Pinaud 15:14

Let me start for from my PC days and my PC days, I begin with rough boogerman software, active words, that that was one of the first templates I, I really begin to, to use. So consistently, that was probably the first one I did in a super consistent way. That was not something on word or, or those kind of things at first obviously wasn't worth while I was going to, to college, I work as a paralegal, so I needed to submit a report every day. So basically, I created a template and I just fill up the five things needed to happen. And that way, you know, I could finish my report much faster than, than the rest. But later on, I include active work, when I move out of the PC, I moved to a piece of software called text expander by a company Bill qname. Smile software, and the both pieces of software are still available. And what both are allows you to do is to create a keyword and then that keyword will expand into text or actions in the case of active words, text only in the case of TextExpander later on, on on iOS. Now you can do that in the keyboard. So I use a lot the keyword for example, for emails, I don't type my email, if you if you put two add signs, it will give me an email that matches the email I use the most my work email, if I type three, at signs now change to my personal email. So I never need to type the whole thing, I just need to use that. That is a way of using a template, I have templates like that for standard response email, when I get a new client, there is a template a response that basically standard includes what they need to do the next steps and everything else. And it's a template just copy, paste, personalize, if needed to be unscented. So those are some of the examples that I use this template and software that I use. Everyday, I have tons of templates now, in notes that I can basically copy paste on and move on.

Francis Wade 17:35

I use a bunch of them in sketch file, it allows you to define time maps, which are heatmap, select like a heat map for a task. So allows you to assign these categories of tasks like for example, the Best Writing Times best times direct. And those could be Tuesday, Thursday and Wednesday from 6am in the morning until 10am 10am in the morning. So allows you to set up these customized heat maps for particular categories of tasks. And as you create or whatever, you know, you come up with a brand new task, you can assign it to one of these heat maps or one of these time maps. And in its algorithm, it tries to optimize your choices, you tell it within each heat map, you say here is the best time, which could be like six to 10. Here's the not so good time, which could be five to 610 to 11. And you can leave the rest blank, which is which means it'll never it'll never assign a task outside of that map. So it can get pretty intricate as you could imagine, because all of these are, they're all overlapping, of course you can create. I

don't think it's an infinite number, I think you could create 20 different time ups for different kinds of tasks. But essentially, what you're doing is you're training the program to behave as if it's the perfect advisor, like the perfect admin, who knows that you only like to write on Tuesdays or Thursdays and Saturdays. So if your admin is in control of your calendar and scheduling time for you to write, they will only pick those particular times and subject to a few changes, they will pick a time that's on the edge or if they had to totally schedule a completely different time they will make break the temp not use a template, let you know that you need it. You're not going to get it done if you're if you stick to those timeframes. But how about Wednesday at four o'clock. So it allows you basically training the program to be a better and better and better advisor over time. And of course, this is a whole bunch of reflection as to what you do with respect to your time preferences because I think we mentioned before, we're all you templates and I think we all have a weekly template of some Can I imagine we have breakfast at a particular time lunch dinner, we work we work out, we rest, I think we put away skin pal is trying to give you the flexibility to take what you do in your real life and translate it into these time lapse templates.

Art Gelwicks 20:23

Yeah, I've got three main ones I'll call out. And like the guys have said, I mean, I use tons of them for various things. But the three main applications are OneNote notion and SharePoint OneNote note has a built in template zation function. And Matter of fact, I'm using it right now, to be able to take a page that you've already written and say save this as a template and also set it as the default for a section. So that way, any new pages you create in that section, automatically pick up that template, it's a great way to optimize and streamline the process of creating new content. notion has something very similar where you can templatized not only whole pages, but you can templatized sections of content, for example, like a database table, and you can have it drop another configured database table into a page so that you have a streamlined way of putting pieces in place, SharePoint a little bit different. SharePoint, I use the template zation function on their news posting quite a bit to be able to generate standardized types of news posts. within SharePoint sites, you just select the template for the news post you're creating, fill it out and publish it, and you're off and running. So those are the three most common ones. But if I think about it, I've got template after template after template. And a lot of them I should probably get rid of because they're probably either old out of date, or just need to be redone.

Raymond Sidney-Smith 21:46

I use so many templates, I'm going to try and keep my my comments brief here. So let's start with email. We've already talked about email. But there are two types of templates in email that I use most explicitly. Those are and I'm in the Gmail interface both personally as well as in at work. So I'm using G Suite, being the Google Small Business advisor for productivity. Clearly, I use G Suite in my work world. And so there are email signatures, and those email signatures are, are changeable, depending upon context. And so I have several different types of email signatures that I might use, depending upon whether I'm sending that email on behalf of myself personally, myself professionally. And when I'm replying or forwarding emails along to folks, when I'm on mobile versus desktop, all of those are different. Then we have templates. So they used to be called canned responses. And we're part of the Gmail labs. And they were they were moved out of Gmail labs into Gmail proper. And now they're available both on the consumer side Gmail, as well as in G Suite. Gmail. And templates are, in essence templates for you to create those things in your email, compose window. And they are so so helpful. As I said, at the top, I actually have just a standard email response template. So as soon as an email comes in, if I am going to read it, but not respond to it, right, this moment, I actually have a template that says, I received your email, I will get back to it. And then it leaves a blank for me to be able to put a date or time or timeframe next week, Tuesday, you know, three months from now, doesn't matter what I put in there. But I it is, in essence is a template, I click the template, it pops it in, I had send another person has been replied to, even though I haven't yet

done the work necessary, but they know that I've received the message because I don't know if they have read receipts turned on on their email system or whatnot. But I want to affirmatively many times let people know I've received their email, do not email me again, it's in my system. And so it's really helpful for just letting people know that on the professional side, then I have a, I have dozens and dozens of templates for different kinds of email that I receive at work, and they don't require me to myself do anything, I just need to give information along. So because of my standing with Google Small Business, I get lots and lots of tech support emails regarding G Suite. I'm not tech support, do not email me tech support questions. And so I have a thoughtful, nice message that outlines where people can go ahead and seek guidance when they do have tech support issues. If people are thinking workflow, and how to set up G Suite in their company, and so forth. I'm happy to personally tailor and meet with those folks and start a contractual relationship, but I'm just not tech support. So I have those email templates set up so that I can just not ignore them. But you know, send a message, it's thoughtful, it has all the information they need to go start getting assistance in the right places, like calling G Suite and getting technical. support from G Suite directly and going going on from there, so I'm not wasting time. And many times that's something that my assistant can do, as opposed to me because now I have created a template that anyone can use to respond to those vast amount of emails that I get that are just sorry, I can't help you directly, but here it goes where you can get that kind of help. Moving on, I have Evernote in Evernote, there is a template gallery. Evernote actually provides you with a body of templates that you can source from including even a GTD template, they have a template called GTD or getting things done. And they then give you the ability to create your own templates. If you have Evernote premium. And I believe it's only Evernote premium, not Evernote basic. And so you then have the ability to create your own templates, I think you can have up to 20 templates, you're capped at that. So what I do in Evernote is actually I just create notes, and then put them into a notebook called templates. You can also create templates and put them into their resident notebooks and just tag them all templates so that you can search against templates, cross notebooks. And those are extremely helpful. I have one that starts out my day. So every day I use the same template, I just open up a new note, click templates inside the body of the editor. And the template gallery opens up I click on my my new productivity day. journal entry item note my new productivity note. And then I start my day by completing the components of what I want and how I want to structure my day. Just a couple of examples of other tools that actually have templates built into them. Trello Trello has a template system built into it, Asana, Asana has a template system built into it. And Google Calendar, you can duplicate events. So many times people are creating from scratch events over and over again, you don't need to just click the three dots icon on any event, and then click Duplicate and it will recreate that event. So of 80% of the details are the same. All you need to do now is change the date and time and maybe some of the interior details of that particular calendar event. And you're off to the races. So just think about that you can create your own templates for almost any Microsoft Office document. And for that matter, any Google document, although that's a little bit more of a manual process, just making a copy of an existing document. But in the Microsoft Office, world, Excel, PowerPoint, Word, you name it, you're able to create a just like the D o t or d o t x, there is a format for each of those types of office files. And then when you when you duplicate that you're not actually duplicating from a, you're not just making a copy, you're actually sourcing the content from that file, which is immutable unless you tell it to change. And then you're sourcing the document content into your new spreadsheet or presentation or what have you. And you're you're off to the races. Now you've created a new file. And you can change that file and it's a normal Excel or PowerPoint file or whatever. And you're just using that file and templates in the Microsoft Office world are really helpful so that you're not kind of messing up your templates by when you make a copy of something maybe you go back and you accidentally muddy up the waters of the existing template. I see that all the time. You know, if you have a centralized database of documents among many people, having those those template files as opposed to just a normal office file now means that when someone double clicks on it, they're going to generate a new

document that's going to be separate from the original source template and it's so so helpful. Okay,

Art Gelwicks 28:50

yeah, one quick area to call out and I neglected on mentioning this earlier. You're gonna find also a lot of templates available in your automation tools. Things like IFTTT, Zapier power automate from Microsoft are loaded with templates which are go back to that earlier. fourth item I mentioned, are great ways to learn how those tools work. Taking typical processes that you'll do, and turning it into an automation, being able to see how that was constructed from the template is a great way to shorten the learning curve. That was one of the first ways I learned how to use power automate was to use the template that they had to strip off attachments from incoming emails and store those attachments into a OneDrive folder. It's a very simple one. But it's a template that I use constantly because it just runs on its own. But it also gave me an opportunity to look at how someone else would create that kind of tool.

Raymond Sidney-Smith 29:49

I also just realized I didn't mention remember the milk and remember, the milk itself doesn't have a template feature. And so I just create checklists. Within particular items, so say I'll say I'll create a project, and it'll have all of the embedded tasks for that project, I will mark it complete. And then that way, it's no longer in view. But whenever I need it, all I need to do is duplicate the project, and then all of the underlying tasks, then come along with the project. And now I have that to, in essence, use for whatever purposes I want. So I'm always looking at the most recent project I completed, or I'm looking for my project template for any projects that have the same structure, the same kind of arc of what I want to get done for that project. And I am very much about connecting my project management software to remember the milk and so many times I'm using, say Asana or Trello to actually generate the tasks over. So I've used that function less than less for work related projects. Because it's Trello or Asana connected to if there's Zapier, that's actually generating those tasks and remember the milk for me. But in my own personal projects, those tasks are actually created by me just going in and manually saying, select this, duplicate it. And now the project that was completed now is a new project that I can then manifest for the current project that I want to complete. So note that you can templated things that don't have a template system in them as long as you're able to duplicate and, and source those things from the outside, even to the effect that in Evernote, for example. Evernote has the ability to export a note in a any x file. And so you can actually have that file sitting on your desktop. And you can just drag and drop it into Evernote and it will now import a new note. And you're good to go. You could just use it as a as a template. So think beyond just the borders of some of these items. For example, in Outlook, you can create a dot XML file just by saving your email to your desktop, that can be a template by itself. You know, you open it up, copy the content and go to town. There are a lot of different ways in which you can create templates, even if the system itself doesn't have its own core template functions.

Francis Wade 32:21

acoustal is morning and evening notes from the impact journal

Augusto Pinaud 32:28

impact journal backs. Yeah,

Francis Wade 32:29

yeah, I think those are templates for starting the day and ending the day. And having, as I mentioned before, I've included ideas from that in my own startup activities at the beginning of the day. So that's, that's a great, great, easy one to use.

Augusto Pinaud 32:44

Yeah, I didn't mention Apple shortcuts. Were you know, I use a lot of those as, as friends said, you know, the planners, and we mentioned the planner, and the impact journal is one of those cases, we mentioned it on a previous episode of ProductivityCast. And it goes every day. So you know, to to allow me to to use or answer similar questions. There is also Dr. Marshall Goldsmith, have a set of questions that came on his book, what could you hear was not get there, I think it is, since title of the book that also provide was a set of questions that you should ask yourself or get somebody to listen to daily, and it's at the end of the day, it's another template and allows you to establish, you know, align, so you can get a better reference on how the day is going. And at the end of the day, that is nothing else than than another template. So if we pay attention to the issue with templates, is they turn invisible into us, you know, as we were talking about SAP hear about if, you know, I was not in in here and say, Oh, yeah, that's that's a template that it's invisible in in my life, you know, I used it the Amazon lady, I can use I use a sloppier template to get the Amazon lady to add things into my iOS reminders, you know, I use big a to add those reminders studies really convenient. As we have a couple of them around the house, I can walk around any of them and say, Hey, big a remind me to do this, it will put it directly into my system. So all of these templates are really designed to help you move forward in an easier way and in a more more effective way.

Raymond Sidney-Smith 34:39

I will I will add that for those on the Android platform. lest you think that you don't have both text replacements as well as the ability to do similar or akin to what Apple shortcuts does. There are different applications on the system that do that for text replacements. You have the personal dictionary, and that's in the Android setting. If you just go to your settings and then type in personal dictionary, it'll pull it up. And that does exactly what Apple's keyboard text replacements do. And also note that on text replacements, if you have Mac OS, and iOS and iPad OS, Apple actually synchronizes those text replacements in the background for you. So if you create that text replacement on your Mac OS, then it's going to synchronize to your other devices, which is very, very slick. And very helpful. Just make sure that you trigger with a character that you don't use. Very often, I have several clients who have who have gotten themselves into lots of text replacement hell, by creating things that like, you know, start with the letter D, or start with letter T for templates, and then all of a sudden, everything they type is now getting converted into a template because of the text replacement. And that can be very, very frustrating. On the apple short cut side. Right now we have Google routines, which is the inbuilt or built in functions within the Google ecosystem. The other side to that is that there's there are some independent applications like Tasker is one that allows you to be able to create these kinds of automations, like Apple shortcuts. And the Tasker application is still kind of developer focused. But you know, it's very techie. So you have to be fairly geeky to make a lot of this work. But there are lots of templates there, I think it's getting better. And there are other applications out there that are similar to that. But I just wanted to make note that if you want it to be able to use templates in the workflow setting, and we'll have some other conversations about automating your systems for greater productivity in future episodes, but just know that those tools do exist on that level as well. With that, let's move on to what are some of the challenges that you face when using templates. And the challenges you see others face in using templates, I use the example of in text replacements, in essence, you using shortcuts, or you know, keywords that trigger that are too common. And so therefore, they start to generate everywhere you don't want them to be generated. And so that's just one common mistake I see in text replacements. And you should definitely use like start every keyboard template with some kind of trigger key stuff like the number sign, then the word so that you know that you're never going to accidentally type in the number sign before the word that you want to trigger to create that text replacement. Those are the kinds of challenges I'm looking to hear from you all and how you overcome them or help others overcome them.

Augusto Pinaud 37:42

For me, I use for everything that is work related, I use the star, three star star, and then the name of the shortcut. And for everything that is personal, I use the.so dot.so. If I put that dot home, he will give me the address of home. So if I want to type that so that way, I can separate those. So if I do dot dot and the initial my kids, he will do their name, the full name. So that allows me to to really go fast and into those into the things I know in Finn is when I get a non iOS device, and it's duck typing, dot, dot and initials on work.

Art Gelwicks 38:21

I think for me, the biggest challenge is not getting hung up as hung up on creating the template as is putting it to use. I find it's one of those rabbit holes where it's easy to sit there and continue to try and tune to create the perfect template that will deal with all possible situations and all possible information. And it just spirals woefully out of control. Rather than being flexible enough to handle the things that fall outside the scope of your template. For example, let's take something simple like meeting minutes. I mean, we we all know we've all seen templates for capturing meeting minutes. And they all look different. And it's different maybe depending on the type of meeting. And depending on what you're trying to capture. Trying to create one uniform meeting minute template that covers all gambits. It's just in my book not worth the effort. It's better to have followed the the ad 20 get something that's going to at least get you in the ballpark. And then you can tune as you need to on the fly. And if you find that you're doing the same tuning multiple times, maybe then go back and refine your template a little bit more. But I just I think that perfectionist rabbit hole can be really pretty nasty when it comes to templates.

Francis Wade 39:39

I think I used to think of templates as they The more the merrier. I think I've changed my point of view. So what are the minimum that I need to have that I can get away with? And I think that point of view, I shifted because of the time it takes to create a template And then there were certain use cases that were only happened once. And I would never go back to that template again. And realize that the time spent creating it was wasn't really worth it. So no, I only did I kind of take, I had a pause, and I say, Okay, do I need to create a template, because I'm either gonna forget this, or because I do it so often that I, I need to use it over and over again. So it's gonna save time because of the frequency. So I think I use those two rules. I use, I use the same template, for example, to build every single presentation, I'm going to make every single speech, presentation, sales pitch, sometimes, if I'm writing copy, I follow a standard outline. And for a while, I couldn't even find the outline I originally created, I beefed it up, realize that it applied to a few other places. So it went from being something I was using infrequently to something I use, at least once a week to create all these different kinds of outputs. And so I become I become stingy. I think that's that, that's where my head is no. Anyway,

Raymond Sidney-Smith 41:24

you're on the heels of what Art was talking about in terms of template design, in, especially in the document automation and document assembly space, I really try to have people think about things from two different stages. One is that 8020 rule, right? The Pareto principle of document assembly and or templates is you the template needs to do 80% of the work, it doesn't need to do 90 doesn't need to do 100% start with 80%. And that means structure and base level substance of the content. And many times it's actually the structure that is the most difficult part of any level of templated. So especially in document assembly, where you might have a document that is very complex, and so you want to make sure it's in the right form, say you're doing grant writing, and you want to make sure the grant is is in the right flow for every kind of RFP that you're going to put forward for a grant. And so you want to you want to make sure that you are not getting too tied up in the fact that you could just move a section above or below to make sure it fits the requirements of the request for proposal for that particular grant. And on the flip side, in terms of say, performance, legal contracts, you want to make sure that those are in a standard format. And many times it's just looking at others to make sure that it's

staying within that set of boundaries. And you know, and here in the United States, you know, we have the five fundamental components of a contract, just making sure you're touching point on what the five fundamental components of a contract are, I'm not gonna get into it here. But but once you have those pieces in place, then you can now know that the contract is good enough, and and then satisficing. to that level. The other part that I see a lot of people make mistakes in templates with is putting in too much content. And, and so the the template becomes this bloated thing, and you have to actually delete more stuff, then you have to enter. And that means there's a rate of diminishing return. If the template is supposed to cut down the the amount of input that we have to do to get to the terminal output, then if you have to delete more to get to that output, maybe you need multiple templates, and then that defines what the outcomes will be. Or you need to just decide that the system you're using is not designed for that kind of template. And then you may need to step outside of say, Evernote or Microsoft Word or OneNote or otherwise, and choose a document automation specific software. And there are many of them out there. I used to be in the high dock space. And so hot docks is a document assembly software. It's not cheap. So I'm not recommending anybody to go out there. But if you're in a corporate or enterprise environment, you're trying to invest in document assembly. It's probably one of the best products out there for that. But there are ones that are web based. There are ones that are open source where you can host your own doc assemble is one of those and I absolutely am a huge fan of document assembly software, we have to do a separate episode just on that topic. But the goal is not to get tied to intimately with shoving everything into the document into that particular template because you're going to in essence create more complexity and when more complexity rises the level mistakes that can be made increases exponentially. Because remember, if you're using a template, especially if you're sharing it, if it's a collaborative template, then there are that many more people who are generating the document, who potentially aren't trained on how to get the consistent output. And therefore, we're going to create more problems downstream for the organization. So it just depends on whether this is you using it in your own system, or whether you're collaborating with others, and really deciding on how those worked together. I know that for me, where I was creating hundreds of templates a year that were being used across an entire organization, my goal was to be able to put in as few parts of the template as necessary, that really solidly answered the questions of what the outcome of the of the documents or the forms, you know, sometimes I would be doing complex tax returns that were being generated in the assembly software. And so if I just made sure that the primary tax calculations worked, every time that I didn't worry so much about silly little optional fields and whatnot, because the attorneys and the accountants could then complete those on the back end. And they were completely fine with that, because they knew that they could trust the numbers. So decide on what's most important as the outcome and which parts are optional. And you can just deal with that on the on the back end in some easy way. And then focus on that that's going to get you over the biggest hurdle of of the too much stuff in one template problem. Okay, final comments, what's the number one actionable takeaway listeners should take from this episode?

Augusto Pinaud 46:41

Well, as a final note is important to notice one, the importance of templates. Second, as we mentioned, some of these templates get invisible to you. So pay attention if you are using ones and which ones you're using consciously or unconsciously, and bring them back to conscious bring them back to what you are actually wanting to accomplish. And the last thing is keep it simple. It's better to have three templates of the thing with different levels of detail than one that then you need to spend the time every time deleting the information you do not want to add in there.

Francis Wade 47:20

Perhaps look for those areas that I mentioned before the ones that are important within frequent, which means that there'll be stopped that you may forget the next time we need to do

it, or the ones that are high frequency. I would save time because you put together a template and and look for the look for the best or the low hanging fruit and try it out.

Art Gelwicks 47:43

Yeah, I have to agree with Francis on that one. If you're not using templates, you should absolutely be looking into using templates, if for no other reason to simplify what you're doing, and to cut down the road work and allow you to focus on the work that really requires you to think about it. If you're using templates, Good, keep it up. look at ways to improve and refine them. But the most basic if you're not do it

Raymond Sidney-Smith 48:14

start. So I have two pieces of advice for folks. One is to look at the processes in your days. So what are the workflows that you're doing and which ones are repeatable and which ones are just unique every time and then look at the repeatable ones, the ones that are consistently similar, and whether or not there are things that you are doing. Like if you go into the same system every day and punch in the same information. We're not talking about passwords. But we're talking about just the same substance in different places, then there's probably an opportunity there for you to do that. But it really makes you have to step back and look at the Gestalt of your workflows throughout the day, what are the workflow routines, and then decide what can be automated in terms of content and and as well as just the the actual steps involved as well, where maybe as as Art talked about an iftt or Zapier might be able to or power automate or otherwise Trello. Butler you name it can start to implement some of the the efficiencies of automation. Then there's the other side, which is that so often than not, people don't know where to start, because they just don't know where to start writing a template from scratch. There should be no writing of templates from scratch. We have Google, we have the World Wide Web. So search for templates, there are so so many templates out there. And even if it's a template that is a PDF that you're using as just a starting point of seeing what other people have done can be immensely helpful for being able to then say, Okay, this is what I don't want. This template looks horrible. This template It looks beautiful. And now let me go from there. You don't need to start from scratch. And you can start with kind of the lowest hanging fruit, the things that you do the most often really will get you the greatest productive gain. And that's where I think that you should start with templates. And so with that, thank you, gentlemen, for this conversation, we have had a lot of fun. While we are at the end of our discussion, the conversation doesn't stop here. If you have a question or a comment about what we've discussed during this cast, please visit our episode page on productivity cast dotnet there on the podcast episode page on the website at the bottom of the page, feel free to leave a comment or a question. We read and respond to them if you are requesting a response. And so feel free to go ahead and do that. If this is your first time with us, please consider adding us to your favorite podcast app. If you click on the subscribe tab on ProductivityCast dotnet. You'll see the instructions to follow us and get episodes downloaded for free every time a new one comes out. If you have a topic about personal productivity you'd like us to discuss on a future cast, please visit productivity cast dotnet forward slash contact, you can leave a voice recorded message we have a little speaker icon you click on the speaker icon. It'll ask for access to your microphone and you can actually record a message to us or you can type us a message and we'll maybe feature it on a future episode. Who knows. I want to thank Augusto Pinaud Francis Wade, and Art Gelwicks for joining me here on ProductivityCast each and every week, you can learn more about them and their work by visiting productivitycast.net as well. I'm Ray Sidney-Smith and on behalf of all of us at ProductivityCast here's to your productive life.

Voiceover artist 51:40

And that's it for this ProductivityCast, the weekly show about all things productivity, with your hosts, Ray Sidney-Smith and Augusto Pinaud with Francis Wade and Art Gelwicks.